

# Global Wafer Dicing Blade Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Wafer Dicing Blade market size is expected to reach \$ 703 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Wafer dicing blades are ultra-thin circular precision tools mounted on high-speed wafer dicing saw spindles to mechanically separate processed semiconductor wafers into individual dies using diamond abrasives. They generally consist of diamond grains embedded in an electroformed nickel, resin, or sintered metal bond, with an optional aluminum hub. The principal product structures are hub blades and hubless blades. Cutting-edge thicknesses for wafer-grade products generally range from approximately 10 to 300 micrometers, with products between 20 and 100 micrometers accounting for a substantial proportion of commercial applications. Blade design must balance kerf width, chipping performance, cutting speed, blade life, rigidity, and self-sharpening capability.

Wafer dicing blades are primarily used to process silicon, gallium arsenide, indium phosphide, silicon carbide, gallium nitride, lithium tantalate, and other semiconductor or functional wafers. Major applications include integrated circuits, power semiconductors, radio-frequency devices, light-emitting diodes, microelectromechanical systems, sensors, and optoelectronic devices. Major production bases are located in Japan, China, South Korea, Taiwan, Singapore, the United States, and Europe. The product category excludes ingot slicing blades, wafer thinning wheels, laser dicing equipment, plasma dicing equipment, and general-purpose package or substrate singulation blades.

In 2025, global wafer dicing blade production reached approximately 5.7 million to 6.2 million pieces. The weighted ex-works price of mainstream volume products was

approximately USD 72 to USD 84 per piece. Standard electroformed nickel-bond hub and hubless blades were generally concentrated within this range, while high-precision ultra-thin blades, silicon carbide and gallium arsenide application blades, and low-volume customized products commanded higher unit prices.

The continued expansion of artificial intelligence computing, high-performance computing, advanced memory, automotive electronics, power electronics, radio-frequency communications, and intelligent sensing is generating stable consumables demand for wafer dicing blades. Recovering wafer shipments, expanding advanced packaging capacity, and increasing investment in power semiconductor manufacturing are supporting higher consumption among outsourced semiconductor assembly and test providers and integrated device manufacturers. At the same time, thinner wafers, narrower dicing streets, smaller dies, low-k dielectric materials, and increasingly complex metallization structures are driving demand for thinner cutting edges, more uniform diamond grit distribution, tighter bond control, and lower-chipping blade designs. The commercialization of hard and brittle semiconductor materials, including silicon carbide, gallium nitride, and gallium arsenide, is also creating opportunities for specialized blades with higher rigidity, stronger self-sharpening performance, and longer service life.

The market nevertheless faces substitution pressure from stealth laser dicing, laser full-cut processing, and plasma dicing, particularly in ultra-thin wafers, low-k devices, miniature chiplets, and selected high-value semiconductor applications. Blade manufacturers must also manage lengthy customer qualification cycles, strict batch-to-batch consistency requirements, yield-related performance expectations, raw material and foreign-exchange volatility, semiconductor inventory cycles, and international trade restrictions. Although the purchase cost of a dicing blade is small compared with the value of the wafer being processed, blade performance directly affects chipping, cracking, die strength, and final production yield, making customers reluctant to replace qualified products without extensive validation. Competition is therefore shifting from basic price positioning toward bond formulation, blade-to-equipment compatibility, application testing, on-site process support, and total cutting cost. Manufacturers offering comprehensive bond technologies, both hub and hubless product portfolios, customized engineering, and localized technical support are expected to strengthen their competitive positions.

This report studies the global Wafer Dicing Blade production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Wafer Dicing Blade and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Wafer Dicing Blade that contribute to its increasing demand across many markets.

#### Highlights and key features of the study

Global Wafer Dicing Blade total production and demand, 2021-2032, (Million Pcs)

Global Wafer Dicing Blade total production value, 2021-2032, (USD Million)

Global Wafer Dicing Blade production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs), (based on production site)

Global Wafer Dicing Blade consumption by region & country, CAGR, 2021-2032 & (Million Pcs)

U.S. VS China: Wafer Dicing Blade domestic production, consumption, key domestic manufacturers and share

Global Wafer Dicing Blade production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Pcs)

Global Wafer Dicing Blade production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs)

Global Wafer Dicing Blade production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs)

This report profiles key players in the global Wafer Dicing Blade market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include DISCO Corporation, Asahi Diamond Industrial Co., Ltd., Tokyo Seimitsu Co., Ltd., Kulicke and Soffa Industries, Inc., Saint-Gobain S.A., UKAM Industrial Superhard Tools, Thermocarbon Inc., YMB Co., Ltd., EHWA DIAMOND INDUSTRIAL CO., LTD., Shinhan Diamond Industrial Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Wafer Dicing Blade market

#### Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Pcs) and average price (US\$/Pcs) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

#### Global Wafer Dicing Blade Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Wafer Dicing Blade Market, Segmentation by Type:

Hubless Blade

Hub Blade

#### Global Wafer Dicing Blade Market, Segmentation by Wafer Material:

Silicon Wafers

Gallium Arsenide and Indium Phosphide Wafers

Silicon Carbide and Gallium Nitride Wafers

Others

Global Wafer Dicing Blade Market, Segmentation by Wafer Diameter:

Up to 150 Millimeters

200 Millimeters

300 Millimeters and Above

Global Wafer Dicing Blade Market, Segmentation by Bond Type:

Electroformed Nickel Bond

Resin Bond

Sintered Metal Bond

Others

Global Wafer Dicing Blade Market, Segmentation by Application:

Memory and Logic Devices

Power Semiconductor Devices

Optoelectronic and Radio Frequency Devices

MEMS and Sensor Devices

Companies Profiled:

DISCO Corporation

Asahi Diamond Industrial Co., Ltd.

Tokyo Seimitsu Co., Ltd.

Kulicke and Soffa Industries, Inc.

Saint-Gobain S.A.

UKAM Industrial Superhard Tools

Thermocarbon Inc.

YMB Co., Ltd.

EHWA DIAMOND INDUSTRIAL CO., LTD.

Shinhan Diamond Industrial Co., Ltd.

YDI Co., Ltd.

KINIK COMPANY

NDS (TAIWAN) CO., LTD.

GL Tech Co., Ltd.

Shanghai Sinyang Semiconductor Materials Co., Ltd.

Nantong Wintime Semiconductor Technology Co., Ltd.

Zhengzhou Abrasives Grinding Research Institute Co., Ltd.

Nanjing Sanchao Advanced Materials Co., Ltd.

Zhejiang Xiste Technology Co., Ltd.

Suzhou Sail Science & Technology Co., Ltd.

Key Questions Answered:

1. How big is the global Wafer Dicing Blade market?
2. What is the demand of the global Wafer Dicing Blade market?
3. What is the year over year growth of the global Wafer Dicing Blade market?
4. What is the production and production value of the global Wafer Dicing Blade market?
5. Who are the key producers in the global Wafer Dicing Blade market?
6. What are the growth factors driving the market demand?

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